## Operational Policy

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| **Policy title:** | Customer Service and Response Policy | | |
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| **Approved:** | Kris Kautz, OHA Deputy of Administration<br>Seth Lyon, ODHS Chief Operations Officer | | |

### Purpose

The Oregon Department of Human Services (ODHS) and Oregon Health Authority (OHA) are committed to quality customer service.

ODHS and OHA customers are the people we serve, those we partner with, and the people we work alongside. Only by supporting each other can we successfully support our external customers.

The way we treat our customers reflects our commitment to equity, service, and transparency. All programs and sections of ODHS and OHA deliver high-quality customer service with the goal of creating individual and public satisfaction, and trust in our staff and the services we offer. The agencies have a customer focused service environment that is accessible, timely and responsive, meeting the unique needs of individuals who have varying abilities and identities. This includes ensuring communications that are appropriate and effective in terms of language, culture and accessibility.

### Description

This policy describes the way ODHS and OHA will meet Oregon enterprise goals related to customer service. The core of the policy is the creation and implementation of a customer service plan that documents:

- Metrics and goals for serving those outside our agency.
- Communication and feedback channels related to those we serve and partner with outside the agencies.
- Communication and feedback channels related to how we serve each other, our internal partners.
- Reporting requirements.
- How the agency will use the feedback received to create program specific and agency wide customer service improvement efforts, as appropriate.

### Applicability

This policy applies to all ODHS and OHA staff including employees, volunteers, trainees and interns.

As keepers of the public trust, all agency employees have a responsibility to comply with state and agency policies, administrative rule, and state and federal law. The agency takes this responsibility seriously and failure to fulfill this responsibility is not treated lightly. Employees who fail to comply with state or agency policy, administrative rule, or state and federal law may face progressive discipline, up to and including dismissal from state service.

**Policy**

1. ODHS and OHA serve millions of people every year. Our customers include:
    a. The people we serve:
        A. People receiving benefits and services through programs that support individuals and families.
        B. People, businesses, and entities we regulate and license.
    b. The people we partner with including, community partners, advocacy groups.
    c. The people we work with including, employees, volunteers, trainees, and interns.
2. Not later than July 1, 2027, ODHS and OHA shall complete and implement a plan that reflects each section of the agencies and documents new and existing:
    a. Metrics and goals for serving those outside our agency that incorporate, at minimum, required key performance measures (KPMs) designated by the Legislative Fiscal Office.
    b. Communication and feedback channels related to those we serve and partner with outside the agencies, including survey mechanisms designed to provide direct feedback from customers to the agencies.
    c. Communication and feedback channels related to how we serve each other and internal partners.
    d. Monitoring, documentation and reporting requirements, including reporting mechanisms to ensure leadership awareness of the inability of a program or division to meet metrics requirements for more than three months in a row.
    e. How the agency will use the feedback received to create program specific and organization or enterprise-wide customer improvement efforts, as appropriate.
    f. Specific plans for contact center services related to:
        A. Service level goals and managing performance.
        B. Monitoring, documentation, and issue resolution process for when service level goals are not being met for any period longer than 30 days.
        C. A process for reporting to the agency director any time service level goals are not being met for a period of 60 days or longer.
        D. Plans for responding to unexpected, high-volume events.
        E. Contact centers are systems that coordinate telephone and electronic contacts between the agency and the public.
3. ODHS and OHA staff shall follow the ODHS and OHA customer service strategy and other agency provided guidance in all interactions and communications. Key elements of the strategy are outlined in this policy.
4. As the basis of our customer service strategy, ODHS and OHA are committed to:
    a. Anti-racist, equity-centered, trauma informed interaction.
    b. Treating ourselves, our colleagues, and all the communities and individuals we serve with care and respect.
    c. Service excellence, which includes accurate, consistent, and timely response that is accessible to individuals, regardless of language or culture.
    d. Professional workplace communication and quality customer service as defined by this policy.

e. Resolving mistakes and misunderstandings in a professional and timely manner.
f. Using metrics and processes to improve the standards of responsiveness in services that are offered by the agencies.

5. **Quality customer service means** improving customer satisfaction by:
   a. Caring for ourselves and our colleagues so that we can be present and committed to excellence during working hours.
   b. Responding to our customers using professional workplace communication.
   c. Resolving issues within designated time frames while minimizing transfers or call-backs, (see related guidelines document).
      A. Acknowledging customer communications within one business day.
      B. Following established program requirements for response timelines. These timeline requirements should be documented for each program. Guidelines for establishing programs standards and metrics can be found in a related document.
   d. Implementing tracking and reporting mechanisms related to timeliness of service based on requirements outlined in the guidelines document.
6. **Professional workplace communication**, whether verbal or written, means providing plain language information to our customers in a way that is empathetic, accessible, responsive to the needs of community, and supports agency values related to anti-racism, equity, intersectionality, service, and transparency.
7. ODHS and OHA staff shall provide quality customer service and use professional workplace communication.
8. ODHS and OHA ensure accessible customer service through:
   a. Compliance with the Americans with Disabilities Act, Enterprise Information Services (EIS) e-Government guidance, and the Oregon Department of Administrative Services (DAS) customer service standards.
   b. The agencies' policies related to digital accessibility and auxiliary aids, alternate formats, and language access services, that are available on the agencies' public facing policy website and linked in the reference section of this policy.
   c. Clearly posting and routinely verifying contact information on agency webpages for agency storefront hours and locations, operating hours, mail and email contacts, and instructions for receiving customer facing services.
9. ODHS has more than 200 field offices. OHA operates primarily from the Barbara Roberts Human Services Building in Salem and the Portland State Office Building in Portland.
   a. Most agency offices have standard operating hours of 8-5 on business days excluding holidays.
   b. Other programs have extended hours including Oregon Eligibility Program call centers, which takes calls from 7 a.m. to 6 p.m. Monday through Friday, and the 24-hour, 365 days per year SafeLine that routes to various programs, individuals or message services.
   c. Local operating hours may vary based on local need and staffing availability. Specific office locations and contact information can be found on the agency websites:
      A. ODHS at Find an Office.
      B. OHA at Contact Us.
10. Many ODHS and OHA programs have moved to general rather than individual email addresses and phone numbers with the messages monitored by multiple individuals to reduce service gaps. ODHS and OHA shall designate staff within each program to ensure that contact information available on the website stays up to date.

a. Offices that work directly with the public shall ensure that online contact information includes information about how to schedule an appointment.
b. HR and OIS shall collaborate on an annual reminder to staff to verify their workplace contact information in Workday and Outlook with instructions about how to have information updated.
c. Managers shall ensure that website contact information is updated for individuals as part of onboarding and offboarding.
d. Webpages shall be reviewed for outdated contact information and broken links at least annually.

11. When identified, outdated contact information and broken links shall be corrected.
12. ODHS and OHA shall each maintain a customer service webpage (links in the Reference section of this policy) that can be accessed directly from their home page that:
    a. Defines their customer service strategy.
    b. Provides links to this policy and related documents.
    c. Provides a mechanism for feedback to the agencies.
    d. Provides information about how to file a complaint and documentation of the complaint process, including timelines related to investigation and response.
13. ODHS and OHA shall each designate an agency executive sponsor for customer service monitoring. The executive sponsor is responsible for:
    a. Routinely reviewing information related to the agencies' customer service metrics and initiatives.
    b. Elevating concerns to the full leadership team, as needed.
    c. Directing or delegating specific customer service improvement efforts.
    d. Ensuring agency Key Performance Measures (KPMs) are reported to Oregon leadership, as required.

**References**

Oregon Enterprise Values and Competencies
DAS 107-001-040 Enterprise Customer Service Standards
DAS 50.010.03 Maintaining a Professional Workplace
ODHS Customer Service Website
OHA Customer Service Website

**Forms referenced**

**Related policies**

ODHS 010-022 Trauma Informed Organization Policy
ODHS 010-033-02 Customer Service Complaint Process
OHA 010-022 Organizational Resilience and Healing Approach
OHA 010-033-02 Customer Service Complaint Process
ODHSOHA 010-013 Auxiliary Aids, Alternate Formats, and Language Access Services
ODHSOHA 010-029 Digital Accessibility in Content Creation and Sharing
ODHSOHA 010-030 Digital Accessibility in Hardware, Software and Systems
ODHSOHA 010-033-01 Customer Service and Response Guidelines
ODHSOHA 010-033-02 Best Practices: Response Scripts for Phone and Email
ODHSOHA 010-034 Email Signatures and Auto Replies Policy
ODHSOHA 080-013 Employee Wellness Policy

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